Changing an Action Prior to Submitting to Workflow

See **Change Record** at end of document for updates to this BPP.

Trigger:

A position action request has been created, but not submitted to workflow, and changes need to be made to the request.

Business Process Procedure Overview:

This process demonstrates how users can change or add information to any position action request prior to workflow being submitted. If workflow has already been submitted (and you have a PCR number), you will not be able to change the request unless it has been rejected or cancelled within the workflow process.

You may need to add additional notes or attachments to provide approvers more information concerning this action.

You may not have had all of the address information when you first created the request (especially for a new position request), and you can now update the address information.

Tips and Tricks:

See the OM Tips and Tricks Job Aid for an expanded listing of Best Practices and Tips & Tricks. The job aid is located on the Training Help website http://www.osc.nc.gov/training/osctd/help/ in the following folder: Organizational Management > Job Aids.

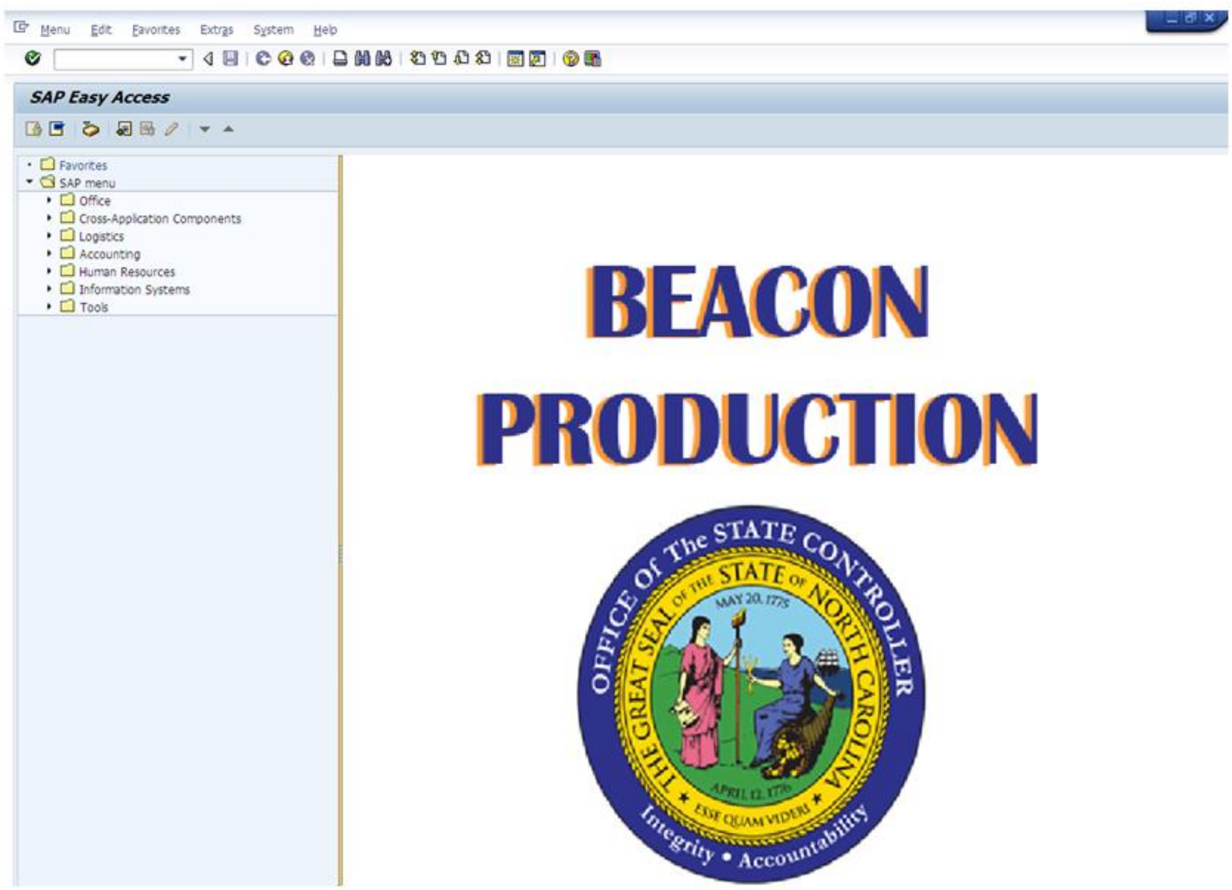
The following instructions only take the Initiator through changing a Position action prior to submitting it to Workflow. See the individual instructions per approver level for more details.

- **Display** is used to access information for display purposes only. No changes can be made to the relationship records. Contact BEST Shared Services for changes.
- **Copy** is used most of the time. This will delimit the existing record and create a new record with the start date given. Copying keeps a history of what the record used to be.
- **Change** is only used if you make a spelling or other simple error, and want to change the record. There is no history tracked on what the record used to be if you use the change functionality.

Access Transaction:

Via Menu Path:	This transaction code is not on the menu path. Enter the transaction code in the **Command Field** (white field in the upper left hand corner of the screen. If the Command field is not visible, click the gray triangle in this area to display it). Click **Enter** once the transaction code has been entered.
Via Transaction Code:	ZOMA069

Procedure



1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. **Example**: ZOMA069

2. Click the **Enter** button.

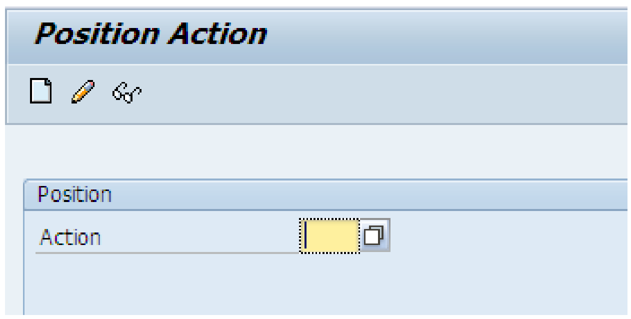
Information

You may want to enter this transaction code in your Favorites folder.

- From the menu at the top of the screen, choose **Favorites > Insert Transaction**.
- Type in **ZOMA069**.
- Click **Enter**.

To see the transaction code displayed in front of the link in your favorites, from the menu at the top of the screen:

- Choose **Extras > Settings**.
- Place a check next to **Display Technical Names**.
- Click **Enter**.



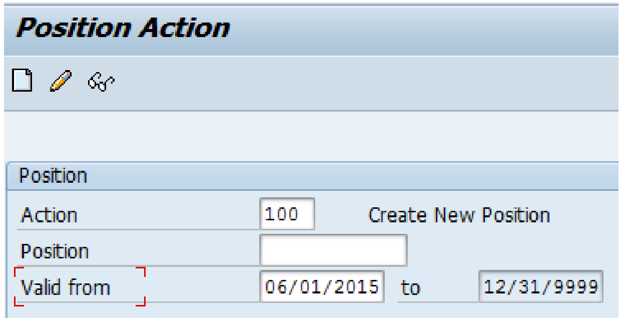
3. Update the following field:

Field Name	Description	Values
Action	A one to four character code that represents an action. An action is a series of procedures that must be completed in order to achieve a specific objective.	Enter value in Action. **Example**: 100

4. Click the **Enter**  button.

   NOTE: You may choose any action number to proceed. In this example, we use action 100 to create a new position, but you are not really creating a new position. The system will not provide the Position field to enter the position request number to be changed until it gets past this initial screen.

   Clicking Enter will validate the action you have requested and display the date fields for entry.



5. Update the following field:

Field Name	Description	Values
Position	Eight digit unique number identifying the characteristics and attributions of a position	Enter value in Position. **Example**: 65003150

Enter the Position number for which you would like to make changes to the request. This request cannot have been submitted to workflow yet.

If you do not know the position number, use the search capability by clicking on the matchcode button (click your cursor in the Position field, and then click on the circle button that displays to the right of the field).

NOTE: If you have submitted a request for this position previously, and it has gone through the entire approval process, and this is a new request for a different change that has not been submitted, you can still change this request. Past complete action requests do not pertain to this request.

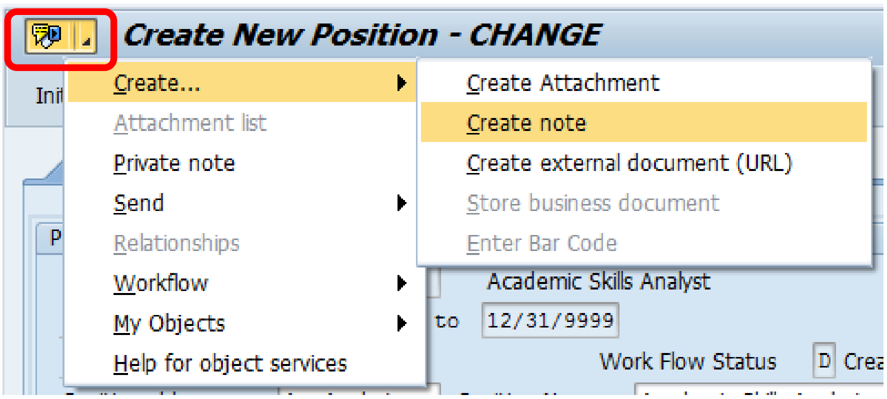
NOTE: Notice the date on this screen in the example is 6/1/15. You do not need to know the original Valid from date on this screen to enter the request in change mode.

6. Click the **Change (F6)** button.

You may make changes to any information on any active tab if the field is open (white, not grayed out). Remember to click Enter to validate the data before saving, as some of the changes may result in adjustments to other fields by the system.

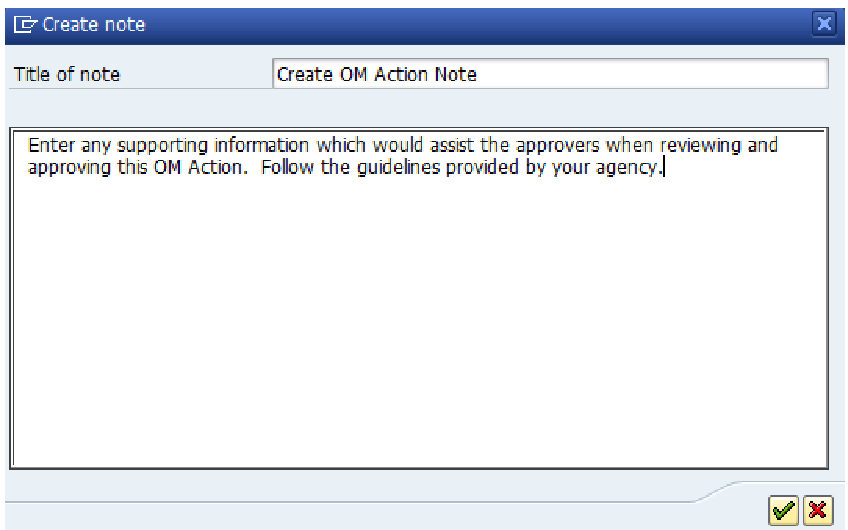
One item you may need to adjust is the set of notes or attachments on this request.

You may enter any information that would be useful to the approvers downstream using the notes area, or attachment area. If you just need to type some information in, or copy and paste from an email, create a note. If you want to add a document as an attachment, use the attachment area.



7. Click the **Services for Objects**  button.

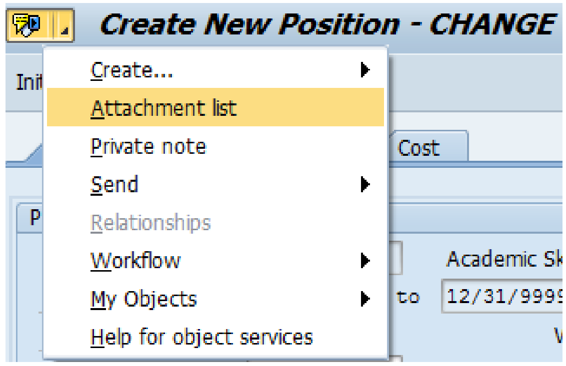
8. Click **Create... >> Create note**.



9. Update the following fields:

Field Name	Description	Values
Title of note	The short text to act as the title of the attachment	Enter value in Title of note. **Example:** Create OM Action Note.
Long text	An open text field	Enter value in Long text. **Example:** appropriate information

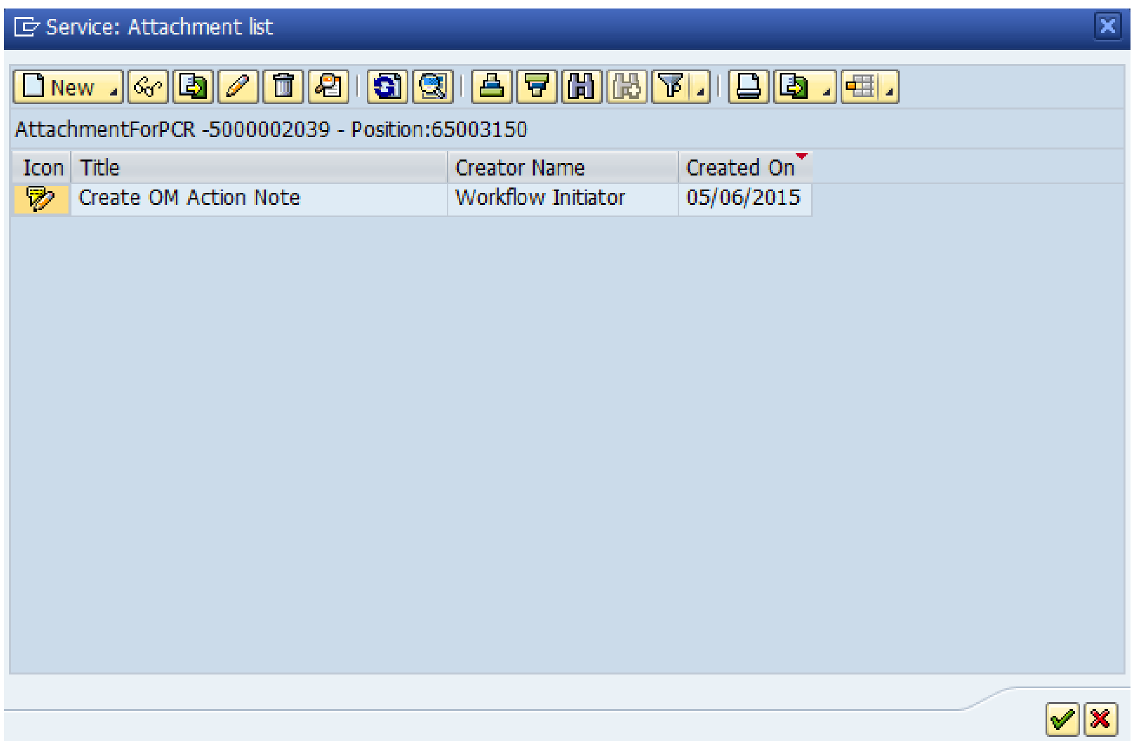
10. Click the **Copy (Enter)**  button.



11. Click the **Services for Objects** button.

To view any notes or attachments added to this position request, go to the list of attachments on this request.

12. Click **Attachment list**.

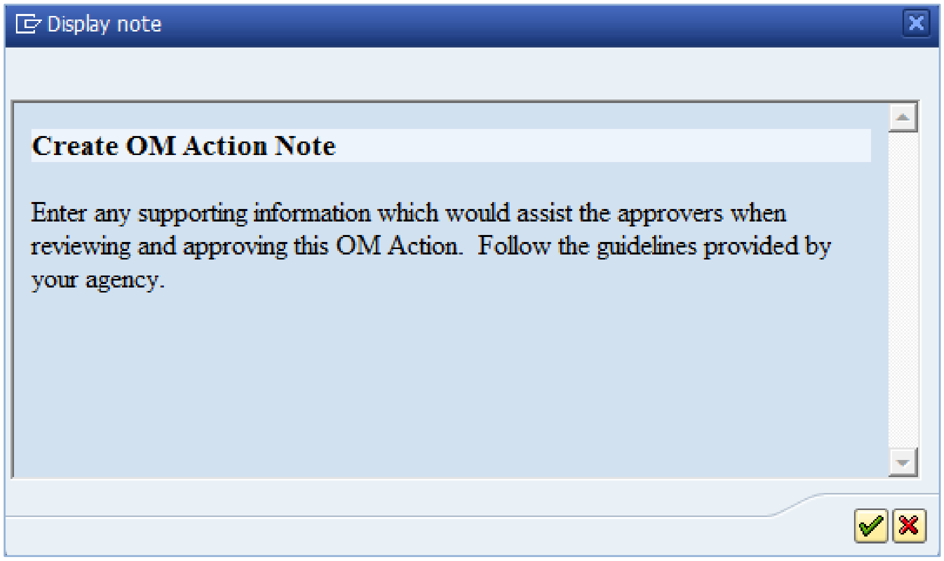


13. Select the **note title** Create OM Action Note row.

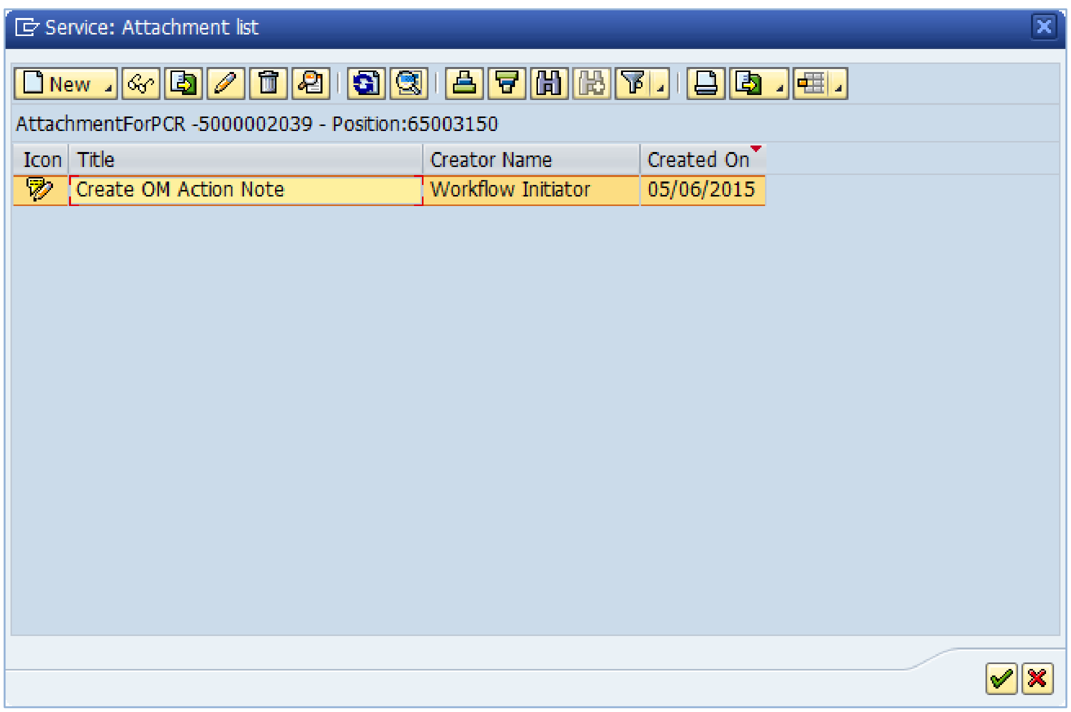
14. Click the **Display (F7)** button.

This note and attachment area only gets attached to this specific PCR. It will follow the PCR through the approval/rejection process, and live with the PCR into the future. When the PCR has been approved, and you are processing the Action (such as a New Hire action), you will need to copy any notes or attachments if they need to be attached to the Action record as well.

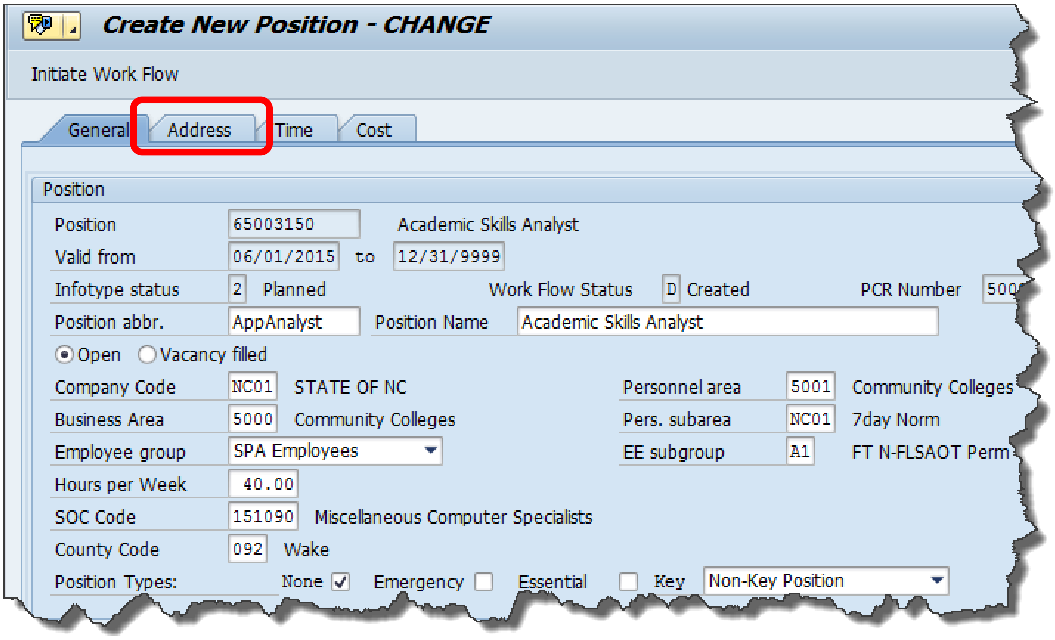
Follow the OSHR or Agency-specific guidelines on notes and attachments to be added.



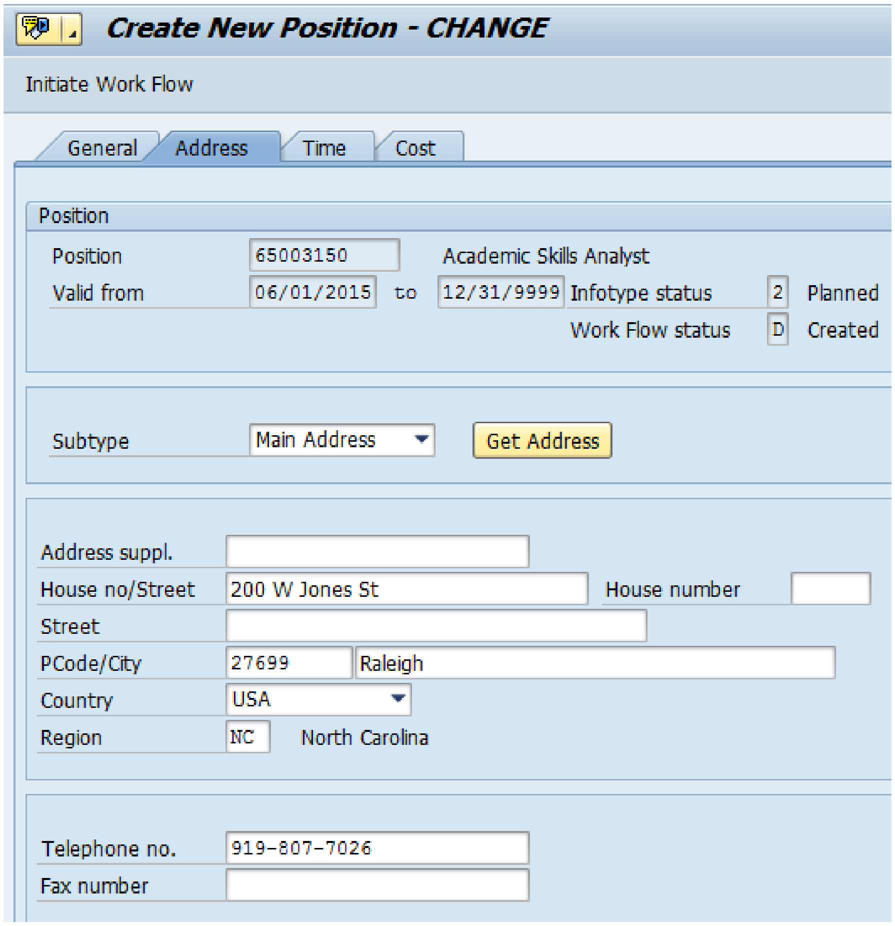
15. Click the **Copy (Enter)** button.



16. Click the **Continue (F8)** button.



17. Click the **Address**  tab.



A position can have one of each of the following types of addresses: courier (overnight mailing address), mailing, main (physical address).

The address information may be changed here prior to the position request being submitted to workflow. Once the request has been submitted to workflow and has a PCR number, you must wait for the workflow process to be complete (approved, rejected or cancelled).

You may not change the address on a position through workflow if you are not processing one of the valid position actions. To change only any field on the address screen on a position, go to transaction code PO13 / Infotype 1028 to make changes directly to the position.

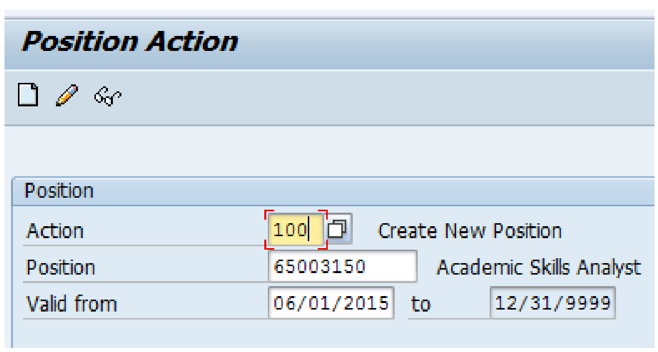
18. Update the following fields:

Field Name	Description	Values
House no/Street	The address street name and number. Identifies the street name up to a maximum of 30 characters.	Enter value in House no/Street. **Example:** 200 W Jones St
PCode/City	Postal zip code and city	Enter value in PCode. **Example:** 27699
PCode/City	Postal zip code and city	Enter value in City. **Example:** Raleigh

19. Click the **Save (Ctrl+S)** button.

    If all of your changes have been made, you may save one more time and click Initiate Workflow to receive a PCR number. You may also return to the main screen after saving without submitting to workflow, and reenter this position action request as many times as you need to make adjustments before submitting.

20. Click the **Back (F3)** button.



21. Click the **Back (F3)** button.

The system task is complete.

Change Record

Change Date: 5/6/15	Changed by: D Lyle
Changes:	• New format and screen captures